

# **HOW TO CHANGE A TOAD® REPORT MANAGER REPORT NAME AND / OR CATEGORY**

## **LESSON FOUR**

**A step by step guide to changing a TOAD®  
Report Manager report name or report  
category**

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## 1 Lesson overview

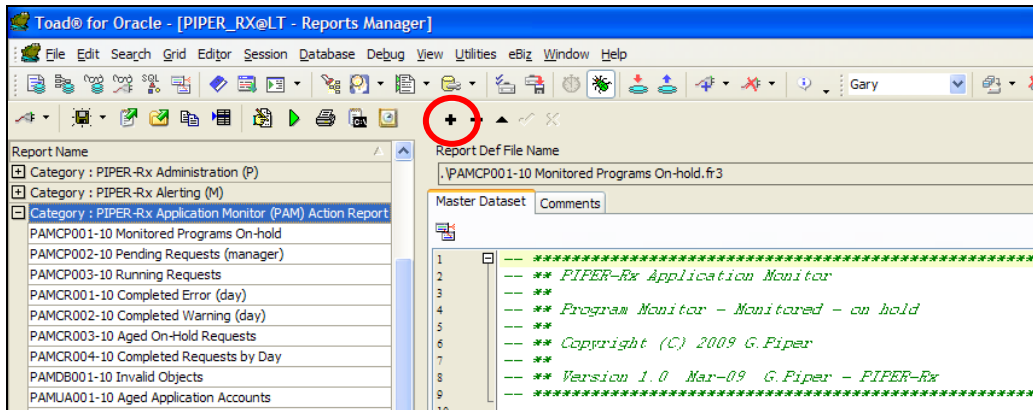
So you either don't like the report name or the category the report is in and you want to either rename the report or move the report to a more suitably named report category. The easiest way to do this and the one that keeps the report name and associated file name the same is to copy the report and then delete the original.

If the new category does not exist then you will have to create the category first. All the steps are outlined below.

## 2 Create a new TOAD® Reports Manager category

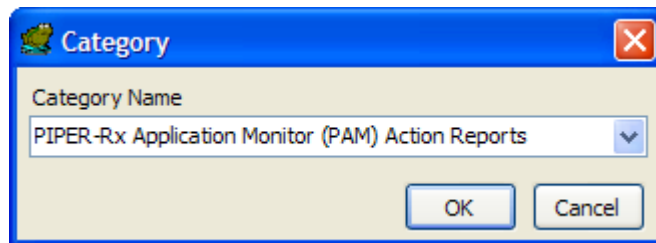
**Step 1:** Launch the TOAD® Reports Manager

**Step 2:** Highlight an existing reports category and select the **+** icon



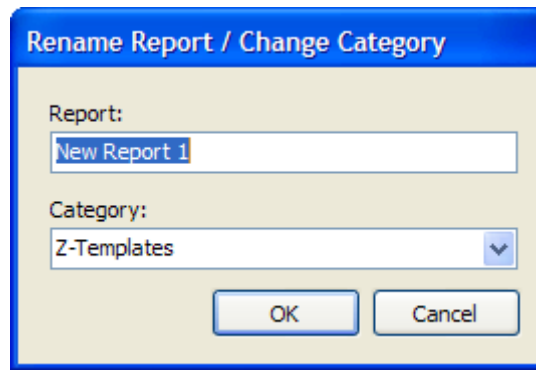
**Note:** If you highlight a report within a category and select the **+** button you will create new report under that category.

**Step 3:** You will then be asked to create a new category name



Overwrite the category name with the new category name. Remember categories are sorted alphabetically.

When you create a new category you will be asked for the report name you wish to create – a category must have at least one report in it. Let TOAD create the report “New Report 1” then you can delete it later when you have your own report in the category.



**Tip:** When deciding on report names – be aware that reports within a category are sorted alphabetically

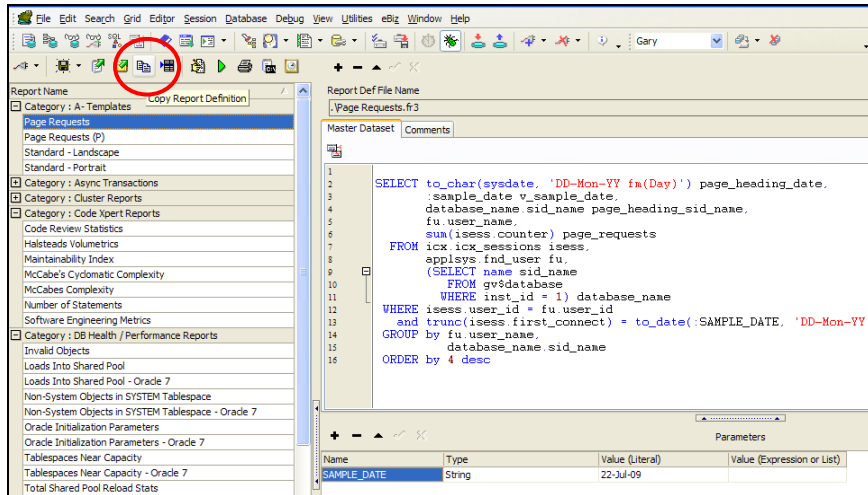
**Warning:** If you make a mistake with the name you should note that deleting the last report from a category also deletes the category.

**Trick:** Up to and including TOAD® 9.6 - The category and any changes you have made to report names and any SQL will only be saved when you exit the TOAD® Reports Manager. (This may have been changed in subsequent TOAD® releases.)

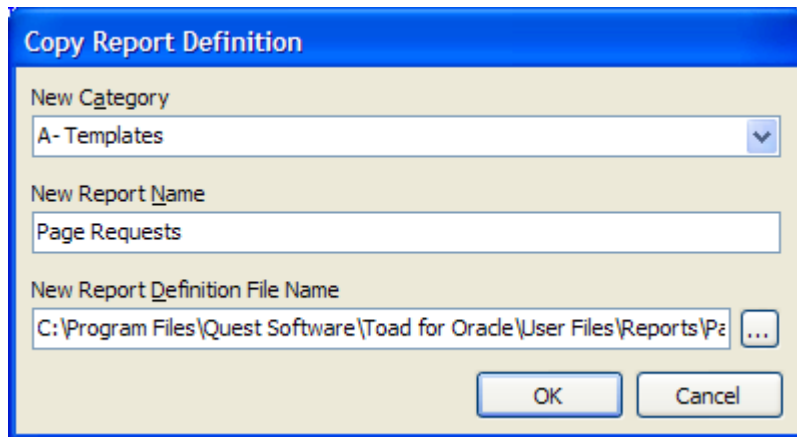
### 3 Copy / Rename a report

**Step 1:** Select the report you wish to copy or rename

**Step 2:** Use the Copy Report Definition button to initiate a copy



You will be presented with the copy Report Definition dialogue box as follows:



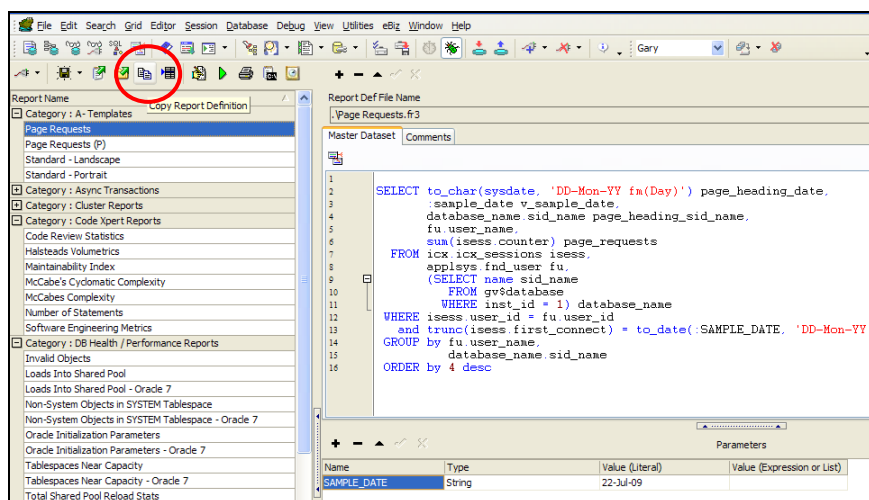
At this point you can rename a report. Don't forget to change the file name to the new name.... then delete the original report once the new report has been created.

## 4 Move the report to a new category and delete the original report

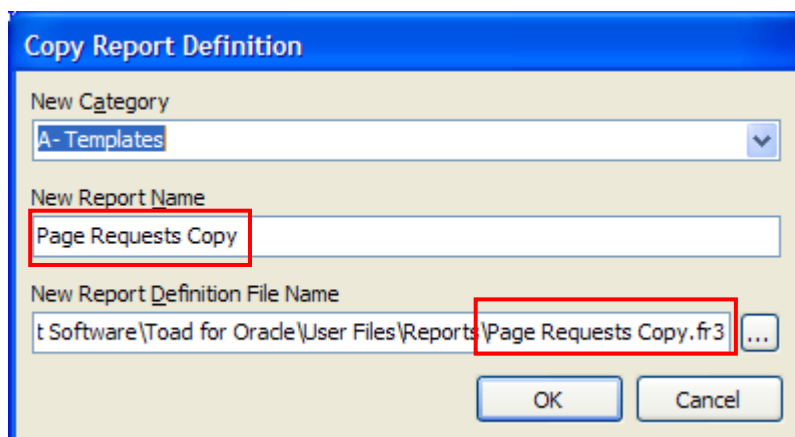
**Note:** When moving a report to another category, you cannot have two reports with the same name or file name so to move a report to a different category you will also need to change the report name and file name.

**Step 1:** Select the report you wish to move

**Step 2:** Use the Copy Report Definition button to initiate a copy

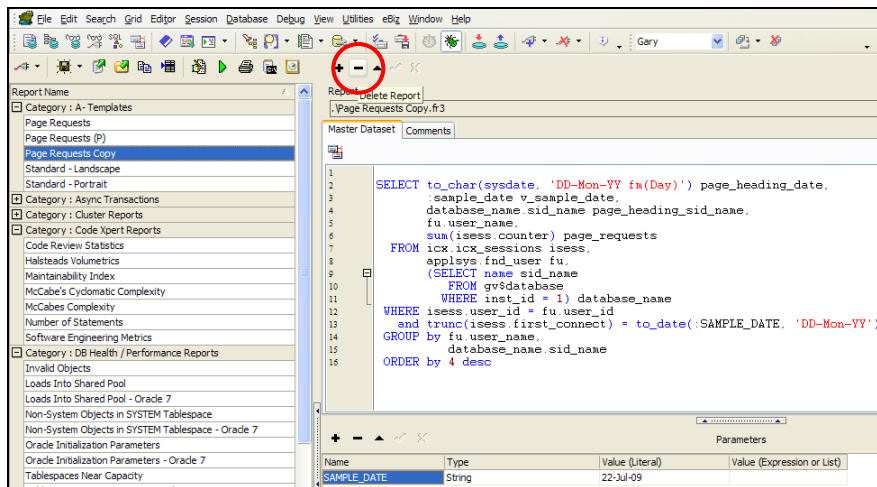


**Step 3:** You will be presented with the copy Report Definition dialogue box as outlined below. In the example below I have left the report in the same report category but copied the report and note I have also changed the file name.

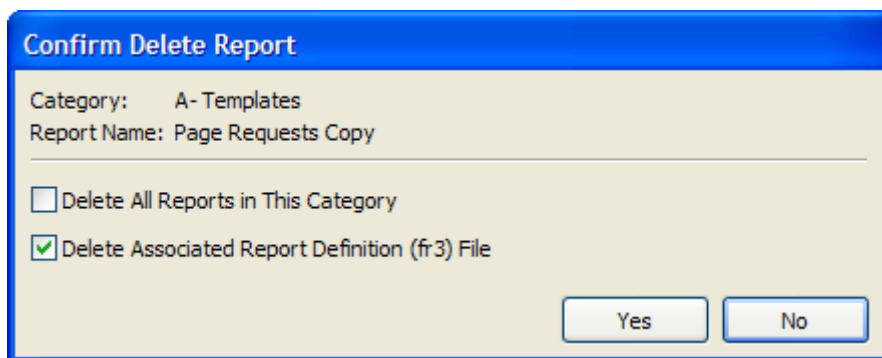


On selecting OK the copy will be created

**Step 4:** Delete the original report by selecting the report you wish to delete and use the Delete Report button to initiate the delete:



**Step 5:** You will be presented with the Confirm Delete Report dialogue box...



Make sure you don't tick the "Delete All Reports in This Category" option as it will certainly do this.

Also make sure the "Delete Associated Report Definition (fr3) File" is ticked to remove the associated report file.

**Note:** There is no recovery once a report has been deleted unless you exported the report in the TRD format.

**Trick:** Up to and including TOAD® 9.6 - The category and any changes you have made to report names and any SQL will only be saved when you exit the TOAD® Reports Manager. (This may have been changed in subsequent TOAD® releases.)

## 5 Disclaimer

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